



# Alameda Contra Costa Transit District Classification Specification

## Retirement Plan Associate Analyst - DRAFT

Exhibit-C

Class Code	FLSA Status	EEO-CAT	Represented Status	Salary Grade	Effective Date	Resolution #
TBD	Exempt	EEO 2 – Professional	AFSCME	04	04/24/2024	24-007

**DEFINITION:** Under direction, performs administrative support and routine to moderately complex analytical work providing Retirement Plan Participants with information concerning their retirement benefits; assist Retirement Plan Participants with the processing of pension-related forms; resolving retirement-related issues, and understanding and applying applicable rules and regulations

Incumbents in this classification are emerging as experienced analysts responsible for learning and over time performing the full range of duties related to the Retirement Plan. The Retirement Plan Associate Analyst is distinguished from the Retirement Plan Assistant Analyst in that the latter is the training level responsible for learning processes, procedures, and regulations related to retirement benefits and programs. This class is distinguished from the next higher level of Retirement Plan Analyst in that the latter works with greater independence and is responsible for assignments of greater complexity and is a professional level classification.

There are four (4) levels within the Retirement Plan Analyst series, which are distinguished from one another by the technical complexity of the assigned duties and the level of discretion and independent judgment exercised.

Positions in the series are flexibly staffed to meet the needs of the Retirement Plan. Positions at the emerging experienced and the experienced levels are normally filled by advancement from the entry-level and promotion is subject to the following: (i) management affirmation that the incumbent is performing the full range of duties assigned (ii) after gaining requisite experience and demonstrating proficiency which meets the minimum qualifications of the next higher-level classification and (iii) learning to mitigate risks associated with procurement methods.

**REPRESENTATIVE FUNCTIONS may include, but are not limited to the following:**

- Performs the initial calculation retirement benefits, reviews related materials, work histories and retirement alternatives for employees.
- Supports activities related to disability retirement including the collection and dissemination of information from applicants, doctors, attorneys, and related parties; assigns cases to medical examiners; and reviews medical reports to ensure compliance with Retirement Plan rules.
- Prepares reports and analyses for the Retirement Board.
- Makes occasional presentations to the Retirement Board.
- Compiles, reviews, audits, and verifies demographic data of participants.
- Works independently on simple special projects.
- Assists in the preparation of the annual tax documents.
- Documents and updates procedures, supports compliance and analysis activities.
- Inputs retiree data into Human Resources Information System.
- Provides assistance, researching and troubleshooting of participant-level issues.
- Performs related duties as required.

**MINIMUM QUALIFICATIONS**

**Knowledge of:** Principles and practices of a public defined benefit plan; techniques for data analysis, principles and practices of records management and maintaining confidentiality; computer software programs for spreadsheets and word processing at an advanced level; techniques for providing a high level of customer service by effectively working with the Retirement Plan participants, contractors, and District staff.

**Ability to:** Communicate effectively both orally and in writing; deliver oral reports articulately and clearly at open public Retirement Board meetings; formulate answers to questions and concerns from the Retirement Board, District employees, other Retirement Plan participants, and the general public succinctly in an unscripted manner



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for the public record; understand and analyze data; prepare spreadsheets on an advanced level, write clear and concise reports, memoranda, policies, correspondence, and educational materials; establish and maintain effective working relationships with those encountered in the course of work using principles of excellent customer service.

**Education:** Equivalent to an associate degree from an accredited college or university with a major in finance, accounting, business administration, public administration, or a related field.

**Experience:** Three (3) years of professional level experience in retirement administration, human resources, finance, or payroll. Demonstrated experience in one or more of the following areas: administering defined benefit plans, payroll, human resources/benefits, finance, or accounting. Two (2) years of experience as Retirement Plan Assistant Analyst may be substituted for two (2) years of required education.

**License & Certification(s):** None.

**Physical Requirements:** Must maintain the physical condition necessary to: (1) perform tasks in an office setting operating a personal computer, keyboards, and other peripheral equipment; (2) possess physical mobility in order to travel between District locations.

**Special Requirements:** Must be willing to occasionally work outside regular business hours and travel between the various District facilities if required.

**Established Date:**

**Revision Date:**